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JAPAN'S MACKEREL MARKET

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U.S. DEPARTMENT OF COMMERCE
National Oceanic and Atmospheric Administration
National Marine Fisheries Service
Southwest Region

NOAA Technical Memorandum NMFS

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EXECUTIVE SUMMARY

Japan is the world's largest importer as well as producer of mackerel (Scomber spp.). In 1991, Japan imported about 195 thousand metric tons of mackerel valued at 242 million dollars, an increase of 169-fold in volume and 286-fold in value from 1985. Much of this increase was due to poor domestic catches and consequent rise in price for mackerel species.

Japan's per household mackerel consumption decreased from 1,812 grams (4 pounds) in 1986 to 797 grams (1.76 pounds) in 1991. This decrease was mainly due to a sharp decline in supply, and increase in price. Annual supply (catch & imports) of mackerel decreased from 1,038 thousand metric tons in 1986 to 496 thousand metric tons in 1991, while price rose from ¥56.87/100g to ¥66.82/100g over the same period, an increase of 18 percent.

Although Japan is the world's largest harvester of mackerel, a decline in catch occurred in 10 of 13 years since 1978. The 1991 catch of 251 thousand metric tons was only 16 percent of the record high of 1,626 thousand metric tons, which occurred in 1979, and was the lowest catch in 36 years.

The United States was the fifth largest supplier of frozen mackerel to Japan in 1991. Up to 1990, supply of frozen mackerel from the United States had been minuscule. A strong yen relative to the dollar has made U.S. products more competitive in the Japanese import market.

As Japan and the United States are signatories to the General Agreement on Tariffs and Trade (GATT), lower tariffs apply to U.S. exports of mackerel products, 10 percent on fresh or frozen products, 15 percent on prepared or preserved products including products in airtight containers. These tariffs are based on CIF (cost, insurance, freight) prices. The tariff for frozen mackerel is higher than rates for most other frozen seafood products imported into Japan. Since the United States is a major exporter of frozen mackerel to Japan, a reduction of the tariff could be beneficial to U.S. exporters.

The future market for sales of U.S. mackerel to Japan depends to a large extent on Japanese mackerel catches in traditional fishing areas, especially the northwest Pacific Ocean. Because the mackerel stocks in the northwest Pacific appear to be declining, increased export of U.S. mackerel has significant potential.

INTRODUCTION

Japan has long been the chief harvester as well as consumer of mackerel (Scomber spp.). Recently, however, Japanese catches of mackerel have declined significantly, and Japan has become increasingly more dependent on imports for its supply. This need is likely to remain because increased catches by the Japanese fleet are not likely in the short term (Suisan Tsushin Sha December 11, 1991).

Two species of mackerel are common in U.S. waters: Atlantic mackerel (S. scombrus) found off the east coast, and chub mackerel (S. japonicus) which occurs off both coasts and occasionally Hawaii. A third species, spotted chub mackerel (S. australasicus) is rare in U.S. waters, but has been reported from Hawaii (Collette and Nauen 1983). Both Atlantic mackerel and chub mackerel are relatively underutilized in the United States, and have export potential, especially to Japan.

This report provides current statistics on mackerel supply (catch, imports, inventory), consumption, price trends, and import regulations. Recommendations on strategies for expanding U.S. mackerel sales to Japan are also given.

WORLD CATCHES

World catches of mackerel have fluctuated between approximately 2.3 and 2.9 million metric tons between 1984 and 1989 (Table 1). Seven countries have had annual landings exceeding 100,000 metric tons during this period. Japan has consistently been the leading producer, but its share of the world total decreased to 23 percent in 1989, compared to a high of 36 percent in 1986. The former Soviet Union and China are among other big producers of mackerel.

Chub mackerel is by far the leading species landed worldwide (Table 2). Significant amounts of Atlantic mackerel are also caught, but only a small amount of spotted chub mackerel is recorded in world landings. Unfortunately, Japanese catches of spotted chub mackerel are included with chub mackerel in their statistics. Thus, it is not possible to determine the quantity of either species landed in Japan. About 75 percent of total mackerel catches consists of chub mackerel (including Japanese catches of spotted chub mackerel), and 25 percent Atlantic mackerel. During 1984-1989, between 59 to 74 percent of chub mackerel catches were made in the northwest Pacific and most of the remainder in the eastern central Atlantic and southeast Pacific (Figure 1 and Table 3).

Table 1. World Mackerel (Scomber spp.) Catch by Major Countries, 1984-1989 (1,000 Metric Tons)

Country	1984	1985	1986	1987	1988	1989
Japan	813	772	945	701	649	527
U.S.S.R.	380	359	377	245	356	334
China	124	93	132	166	241	232
Korea, Rep.	102	68	104	102	163	169
U.K. Scotland	167	190	145	195	189	155
Ecuador	292	114	108	117	147	146
Norway	143	115	157	157	162	143
Others	859	640	659	596	609	602
Total	2,880	2,351	2,627	2,278	2,516	2,308

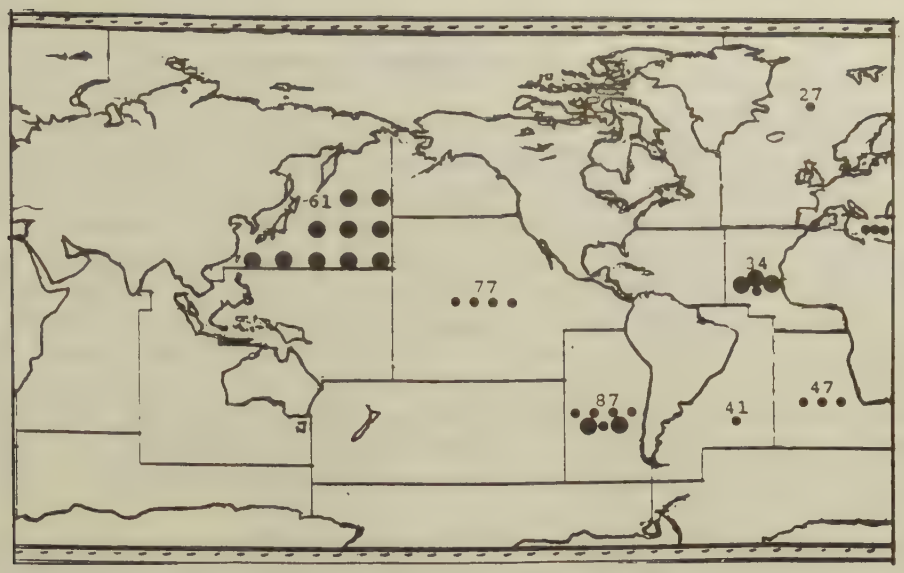
Sources: FAO 1989, 1991a

Table 2. World Mackerel Catch by Major Species, 1984-1989 (1,000 Metric Tons)

Species	1984	1985	1986	1987	1988	1989
Scomber japonicus *	2,218	1,740	2,010	1,568	1,796	1,671
Scomber scombrus	654	601	608	700	709	626
Scomber australasicus	1	2	2	3	6	7
Scomber, unspecified	7	8	7	7	5	4
Total	2,880	2,351	2,627	2,278	2,516	2,308

* Includes Japanese catches of Scomber australasicus

Sources: FAO 1989, 1991a



* Includes Japanese catches of spotted chub mackerel.

●..... 10,000 Metric Tons
●..... 100,000 Metric Tons

Figure 1. Distribution of World's Chub Mackerel (S. japonicus) Catch* by Major FAO Fishing Area, 1989

Table 3. Distribution of World's Chub Mackerel (S. japonicus) Catch* by Major FAO Fishing Area, 1984-1989 (1,000 Metric Tons)

Area	1984	1985	1986	1987	1988	1989
27	10	10	10	9	4	7
34	212	156	215	118	326	314
37	11	27	34	40	41	28
41	72	49	41	10	10	13
47	37	32	31	37	19	30
61	1,331	1,217	1,479	1,133	1,138	986
77	42	34	50	47	51	44
87	206	87	149	174	203	245
Others	297	128	1	0	4	4
Total	2,218	1,740	2,010	1,568	1,796	1,671

* Includes Japanese catches of spotted chub mackerel (S. australasicus).

Sources: FAO 1989, 1991a

JAPAN'S MACKEREL FISHERY

The mackerel fishery is one of the most important fisheries in Japan, ranking fifth in catch behind sardine, pollock, skipjack, and saury in 1991 (Table 4). The Japanese catch of mackerel consists of chub mackerel (called "ma-saba", which translates to "true mackerel"), and S. australasicus (spotted chub mackerel). Spotted chub mackerel, called "goma-saba" in Japan, is often listed as S. tapeinocephalus, a synonym of S. australasicus, in landing data. Spotted chub mackerel are included in catch statistics together with S japonicus (Miwa, A. Mitsubishi International Corporation, Los Angeles, California. pers. commun., March 1992). Close to 100 percent of the Japanese mackerel catches are made in the northwest Pacific.

Although Japan is the world's largest harvester of mackerel its share of the catch has decreased substantially (Table 1). After attaining a high of 1.6 million metric tons in 1978, Japanese catches have undergone a steady decline, and the latest figures show a catch of only 250,000 metric tons in 1991 (Table 5 and Figure 2).

Table 4. Japan's Marine Fisheries Catch by Major Species, 1986-1991 (1,000 Metric Tons)

Species	1986	1987	1988	1989	1990	1991
Sardine	4,578	4,610	4,814	4,416	4,107	3,417
Pollock	1,422	1,313	1,259	1,154	871	554
Skipjack	436	351	460	365	301	395
Saury	217	197	291	247	308	310
Mackerel	945	701	649	527	273	251
Others	3,743	3,957	4,115	3,730	3,650	3,463
Total	11,341	11,129	11,588	10,439	9,510	8,390

Sources: Suisan Tsushin Sha November 28,30, 1990; June 2, 1992
Japan Ministry of Agriculture, Forestry and Fisheries 1982, 1990, 1992

Table 5. Japan's Mackerel Landings, 1978-1991

Year	Total (Metric Tons)	Northwest Pacific (Metric Tons)	Northwest Pacific (% of Total)
1978	1,625,866	1,625,753	100.00
1979	1,491,033	1,491,006	100.00
1980	1,301,121	1,300,994	99.99
1981	908,904	908,478	99.96
1982	717,840	717,512	99.96
1983	804,849	804,478	99.96
1984	813,514	813,261	99.97
1985	772,699	771,419	99.84
1986	944,809	944,340	99.95
1987	701,406	700,686	99.90
1988	648,559	646,196	99.64
1989	527,486	524,809	99.50
1990	273,006	NA	NA
1991	251,000	NA	NA

NA - Not available

Sources: Suisan Tsushin Sha June 2, 1992
Japan Ministry of Agriculture, Forestry and Fisheries 1982, 1990, 1992
FAO 1983, 1989, 1991a

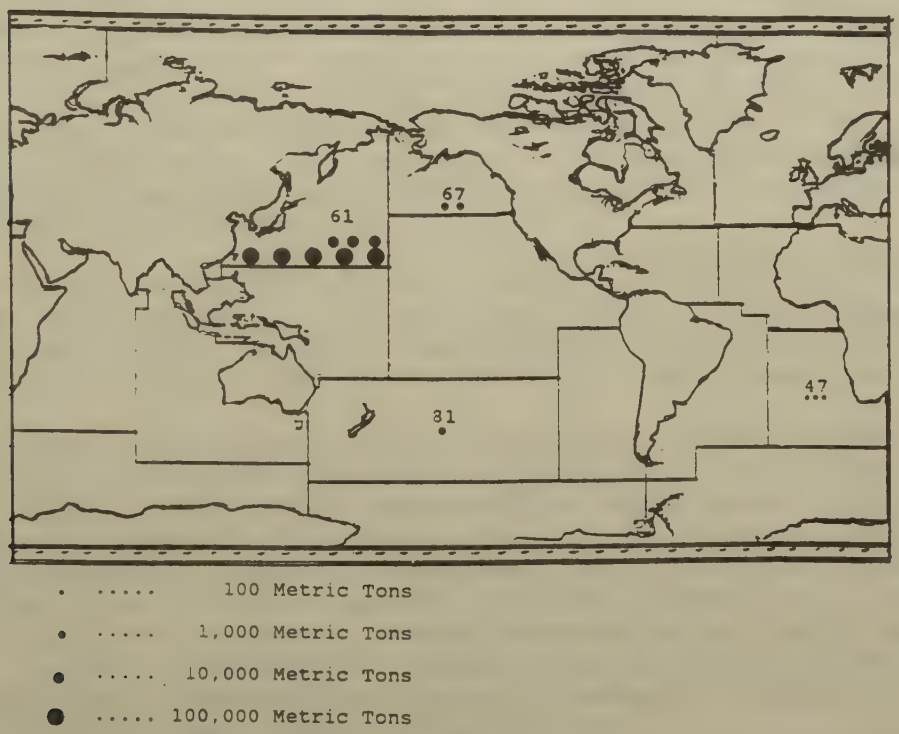


Figure 2. Distribution of Japan's Mackerel Catch by Major FAO Fishing Area, 1989

WORLD MACKEREL IMPORTS

Mackerel is an important commodity in the international seafood trade. Table 6 lists the major mackerel importing countries in 1989 and Table 7 provides the value of the imports. The 450 thousand metric tons traded in 1989 was worth nearly 345 million dollars. Japan led in total imports of mackerel, both in volume and value; nearly all its imports were in the form of frozen fish. Interestingly the imported volume made up only 21 percent of the world total, but the value was approximately 40 percent. In imports of frozen mackerel, Japan was followed closely by the Netherlands (19 percent in volume and 9 percent in value), and Nigeria (15 percent volume; 11 percent value). On the other hand, Ivory Coast was the chief importer of fresh mackerel, in value as well as volume. Papua New Guinea led in imports of prepared products (canned mackerel), accounting for 41 percent in volume, and 31 percent in value.

Table 6. Mackerel Imports by Major Countries, by Volume, 1989 (Metric Tons)

Country	Fresh	Frozen	Prepared	Total
Japan	161	61,524	---	61,685
Netherlands	3,266	55,136	---	58,402
Nigeria	---	44,577	---	44,577
Germany	3,929	32,545	2,997	39,471
France	9,434	20,133	1,322	30,889
Papua New Guinea	---	---	28,340	28,340
Ivory Coast	21,335	---	---	21,335
Italy	3,057	6,684	7,665	17,406
Others	42,039	77,852	29,974	149,865
Total, world	83,221	298,451	70,298	451,970

--- Less than one metric ton

Source: FAO 1991b

Table 7. Mackerel Imports by Major Countries, by Value, 1989 (U.S. $1,000)

Country	Fresh	Frozen	Prepared	Total
Japan	725	69,488	---	70,213
Papua New Guinea	---	---	40,250	40,250
Italy	3,368	3,832	26,642	33,842
Germany	2,340	8,878	7,971	19,189
Nigeria	---	17,570	---	17,570
France	4,226	9,934	2,763	16,923
Netherlands	1,146	15,153	---	16,299
Ivory Coast	11,003	---	---	11,003
Others	16,994	46,794	55,526	119,314
Total, world	39,802	171,649	133,152	344,603

--- Less than one thousand dollars

Source: FAO 1991b

JAPAN'S IMPORTS

Japan's imports of mackerel have risen sharply in recent years (Table 8). In 1991 Japan imported 195 thousand metric tons of mackerel valued at about 242 million dollars. Analysis of the figures reveal that not only has the volume of imports increased, but the unit value of mackerel also increased substantially from 1985 to 1991. This increase in value, together with strengthening of the yen, as well as poor domestic catches, all had some bearing on the increase in imports of mackerel (Suisan Keizai Shinbun Sha February 19, 1992).

Whole frozen fish was the dominant product form of mackerel imported into Japan in 1990 and 1991 (Table 9). Prepared products accounted for only 0.6 percent in volume and 2 percent in value of imports, and fresh products were even less.

In 1985 only three nations supplied frozen mackerel to Japan, but the number increased dramatically to 15 in 1991 (Japan Marine Products Importers Association 1986-1992). Norway has consistently been the leading supplier of frozen mackerel to Japan (presumably Atlantic mackerel) and provided nearly 75 percent of total frozen imports in 1991 (Table 10). Other European nations exported lesser amounts of Atlantic mackerel to Japan. In 1991, the United States for the first time emerged as a significant exporter of mackerel to Japan. Sharply increased imports in 1991 came from all suppliers.

Table 8. Japan's Imports of Fresh, Frozen and Prepared Mackerel, 1985 - 1991

Year	Volume (Metric Tons)	Value (US $1,000)
1985	1,155	848
1986	11,266	7,963
1987	24,209	23,065
1988	39,355	43,945
1989	60,841	70,538
1990	70,989	88,094
1991	195,207	242,339

Source: Japan Marine Products Importers Association 1986-1992

Table 9. Japan's Imports of Mackerel by Product Form, 1990-1991

Product Form	Volume (Metric Tons) 1990	Volume (Metric Tons) 1991	Value (US $1,000) 1990	Value (US $1,000) 1991
Frozen	70,753	194,054	87,053	236,633
Prepared	235	1,142	1,035	5,672
Fresh	1	11	6	34
Total	70,989	195,207	88,094	242,339

Source: Japan Marine Products Importers Association 1991-1992

Table 10. Japan's Imports of Frozen Mackerel by Major Countries, by Volume, 1985 - 1991 (1,000 Metric Tons)

Country	1985	1986	1987	1988	1989	1990	1991
Norway	1.1	8.4	19.5	32.7	53.0	60.8	144.2
Ireland	---	0.3	0.6	0.6	0.7	---	9.8
Denmark	0	---	---	0.6	1.5	6.2	9.8
U.K.	0	---	0.3	1.2	0.6	1.2	8.6
U.S.A.	0	0	---	0	---	0	7.3
Netherlands	0	1.7	2.1	1.2	1.5	1.0	6.7
Canada	---	---	0.5	0.9	0.6	0.4	2.7
Germany	0	0	0	---	0	0.2	2.3
Korea, Rep.	0	0.5	0.6	1.4	2.4	0.1	1.2
Others	0.1	0.1	0.6	0.7	0.4	0.9	1.5
Total	1.2	11.0	24.2	39.3	60.7	70.8	194.1

--- Less than 100 metric tons

Source: Japan Marine Products Importers Association 1986-1992

Tariffs and Non-Tariff Barriers

Japan presently maintains import quotas on 12 categories of fishery commodities. Mackerel is administered under "The 98-Country Fish and Shellfish Quota." This quota, set twice a year in U.S. dollar value, applies to at least nine major fish and shellfish species and species groups: mackerel, jack mackerel, cod, whiting, sardine, yellowtail, pollock, saury, and scallops.

The quota for these fishes has increased yearly, with dramatic increases in 1988 and 1991 (Table 11). Key reasons for this trend are: (1) domestic landings of many of these species have remained severely depressed; (2) the Japanese fleet's direct access to foreign resources has been restricted; (3) mackerel, has continued to be one of the most important seafood items in the Japanese diet.

While the Japanese Ministry of International Trade and Industry (MITI) is the lead agency in administering the quota, it coordinates its actions closely with the Fisheries Agency of the Japanese Ministry of Agriculture, Forestry, and Fisheries. In addition to setting import quotas, the government also controls their allocations. "The 98-Country Fish and Shellfish Quota" is divided into several subsets, including shares for traders (established as well as new traders), joint venture organizations, fishermen, and processor groups.

There is a great deal of variation in the amount of quota held by individual importers. Major Japanese mackerel importers are listed in the Appendix. Quota allocations can be purchased for a fee, which varies depending on prevailing mackerel prices. The fee has recently fluctuated between 10-15 Yen/kg, which is about 4-6 cents per pound at an exchange rate of ¥124 = US$1 (Hokkai Keizai Shinbun Sha August 28, 1992).

Three product forms of mackerel are included in import regulation. The product forms are fresh or chilled mackerel, frozen mackerel, and prepared or preserved mackerel (including fish in airtight containers). As Japan and the United States are signatories to the General Agreement on Tariffs and Trade (GATT), lower tariffs apply to U.S. exports of mackerel products; 10 percent on chilled, fresh, or frozen products, and 15 percent on prepared or preserved products. Tariff rates are calculated as a percentage of cost, insurance, and freight charges (CIF).

Table 11. Japan's Import Quotas for "the 98-Country Fish and Shellfish Quota," 1987 - 1991 (US $1,000)

Fiscal Year	April-Sept.	Oct.-March	Total
1987	3,900	4,600	8,500
1988	8,350	11,950	20,300
1989	11,950	12,440	24,390
1990	12,440	13,100	25,540
1991	17,720	16,530	34,250

Source: Suisan Keizai Shinbun Sha October 1, 1991

SUPPLY

Japanese supply of mackerel for any given year is comprised of three components: cold-storage inventory on January 1, total annual catch, and imports. Table 12 lists the supply and demand for mackerel between 1986 and 1991. Total annual supplies decreased steadily from 1986 to 1990 because imports did not make up for decreased domestic catches. In 1991, however, sharply increased imports of mackerel helped avert a huge deficit in supply, as both catch and inventory were at all-time lows.

Table 12. Japan's Mackerel Supply and Demand, 1986 - 1991 (1,000 Metric Tons)

	1986	1987	1988	1989	1990	1991
Inventory, Jan. 1	82	126	96	106	87	50
Catch	945	701	649	527	273	251
Imports	11	24	39	61	71	195
Supply	**1,038**	**851**	**784**	**694**	**431**	**496**
Inventory, Dec. 31	126	96	106	87	50	120
Demand	**912**	**755**	**678**	**607**	**381**	**376**

Sources: U.S. Department of Commerce 1986-1991
Japan Ministry of Agriculture, Forestry and Fisheries 1982, 1990, 1992
Suisan Tsushin Sha November 28, 30, 1991; April 3, June 2, 1992

CONSUMPTION

In Japan, consumption of mackerel ranked in 9th place in 1991 among all fresh and frozen seafood species groups (Shokuryo Shinbun Sha March 7, 1992). The amount of mackerel consumed per household has declined since 1986. However, a large decrease in mackerel consumption in 1991, to less than 50 percent of the amount in 1986, was probably due to a sharp increase in price from the previous year (Table 13). In 1991 the average Japanese family spent 532 yen for 797 grams ($3.95 for 1.76 pounds) of fresh and frozen mackerel. The number of persons represented in a household varies annually, but is about 2.91-2.97 persons.

Mackerel is prepared in various ways for the table by the Japanese. The most popular dish is broiled, with or without partial drying. For this product, the Japanese prefer larger mackerel with high fat content. Fish over 600 grams (1.3 pounds), bring the highest prices. Mackerel are rarely used as sashimi (raw fish), but depending on the size and price, some are used in boiled, baked, canned, dried, or smoked form, or as dried fish meal, or even minced for use as aquaculture feed. One popular product is pickled mackerel (called "shime-saba"). For this product, fish with low fat content is better. Frozen mackerel is also used for bait, particularly in the longline fisheries for tunas and billfish.

Table 13. Japan's Annual Per Household Consumption of Mackerel, 1986-1991

Year	Expenditure (Yen)	Quantity (gram)	Price (Yen/100 gram)
1986	1,030	1,812	56.87
1987	921	1,631	56.47
1988	821	1,465	56.59
1989	967	1,707	56.67
1990	749	1,232	60.80
1991	532	797	66.83

Sources: Suisan Keizai Shinbun Sha March 1, 1990; March 4, 1991
Minato Shinbun Sha March 31, 1992

PRICE TRENDS

Exvessel Prices

Annual average exvessel prices of fresh mackerel at 51 major landing ports are shown in Table 14, together with annual landing volumes. The exvessel prices at landing ports were dominated by the landing volume; the greater the landings, the lower the prices. As shown in Table 14, the highest price of fresh mackerel, ¥160/kg ($0.54/lb), was realized in 1991 when landings were at a low of 214,576 metric tons.

Table 14. Annual Landings and Average Exvessel Prices of Fresh Mackerel at 51 Major Landing Ports in Japan, 1979-1991

Year	Landings (Metric Tons)	Exvessel Prices (Yen/kg)
1979	1,220,770	45
1980	1,078,585	55
1981	657,113	101
1982	552,739	118
1983	641,979	88
1984	733,164	77
1985	609,102	89
1986	816,083	60
1987	507,521	81
1988	519,271	67
1989	453,647	70
1990	220,194	118
1991	214,576	160

Sources: U.S. Department of Commerce 1980-1991
Japan Ministry of Agriculture, Forestry and Fisheries 1979-1991
Suisan Tsushin Sha February 3, June 3, 1992

Wholesale Prices

Table 15 shows annual average wholesale prices at six major central wholesale markets in Japan between 1983 and 1991, in comparison with the arrival volume. In 1991 the price for fresh mackerel was nearly double that of two years earlier. The price for frozen mackerel also increased substantially in 1991. Fluctuations in wholesale price for both fresh and frozen mackerel closely reflect the available supply.

Table 15. Arrival and Average Wholesale Prices of Mackerel at Six Major Central Wholesale Markets in Japan, 1983-1991

Year	Fresh		Frozen	
	Metric Tons	Yen/kg	Metric Tons	Yen/kg
1983	35,459	343	20,300	342
1984	37,950	336	19,853	340
1985	39,185	337	16,451	325
1986	38,303	339	16,606	340
1987	38,405	332	15,814	379
1988	34,655	329	15,259	365
1989	38,923	300	12,889	322
1990	30,631	394	15,264	318
1991	25,037	565	17,907	384

Sources: Suisan Tshushin Sha February 13, 1991; June 3, 1992
Japan Ministry of Agriculture, Forestry and Fisheries 1985, 1991

CONCLUSIONS

The large market coupled with declining catches in Japan offers mackerel producers of the world an opportunity to increase their exports to Japan. In 1991, about 40 percent of the demand of 376,000 metric tons was provided by imports. Japanese domestic catches of mackerel are likely to remain low in the future (Suisan Tsushin Sha December 11, 1991), so they will have to rely on imports to fill the demand, which should remain high.

Export of U.S. mackerel to Japan has significant potential. Among the key factors favoring this outlook are a significant improvement in the quality of U.S. mackerel packs, a strong yen relative to the dollar, and substantial mackerel resources on both coasts. In general, larger sizes and the high fat content of mackerel are preferred in Japan. Thus, for the Japanese market, perhaps, Atlantic mackerel would be preferred. However, during certain seasons and at particular harvest areas chub mackerel may also have similar attributes. Conversely, leaner mackerel is preferred for use in pickled products, and most chub mackerel shipped from the U.S. west coast to Japan recently has been used in this manner. Both product forms bring high prices compared to other uses for mackerel. Exporters should be careful to grade fish into similar size groups, as well as insuring that they are perfectly preserved in order to maximize the price they receive.

The "Uruguay Round" multilateral negotiations currently being conducted on tariffs for fishery products might result in lower rates for imports of mackerel into Japan. Should this occur, the American fishing industry should be in an even better position to export more mackerel to Japan.

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APPENDIX

MAJOR JAPENESE MACKEREL IMPORTERS

COMPANY: **CO-OPTRADE JAPAN LTD.**
(Export & Import organ of Japanese Consumer's Co-Operative Union)
ADDRESS: 35-1, 1-chome Komagome, Toshima-ku, Tokyo 170
PHONE: 03-3942-6060
FAX: 03-3942-6040
TELEX: J23393 COOPTR

COMPANY: **HOHSUI CORPORATION**
ADDRESS: 9-13, 7-chome Tsukiji, Chuo-ku, Tokyo 104
PHONE: 03-5565-3945
FAX: 03-3542-6808
TELEX: 252-2258

COMPANY: **HOKO FISHING CO., LTD.**
ADDRESS: 2-4, 1-chome Tsukiji, Chuo-ku, Tokyo 104
PHONE: 03-3542-5644
FAX: 03-3545-2167
TELEX: 2522933

COMPANY: **ITO-YOKADO CO., LTD.**
ADDRESS: 1-4, 4-chome Shibakouen, Minato-ku, Tokyo 105
Food Merchandising Dept.
PHONE: 03-3459-2558
FAX: 03-3459-6892
TELEX: J23841

COMPANY: **KAIOH SUISAN CO., LTD.**
ADDRESS: 6-7, 2-chome Tsukiji, Chuo-ku, Tokyo 104
PHONE: 03-3543-6066
FAX: 03-3545-1689
TELEX: 2524626 KAIOH J

COMPANY: **KANEKYO-SANYO REIZO CO., LTD.**
ADDRESS: Kahidoki Shuhan Bldg., 10-10, 7-chome Tsukiji
Chuo-ku, Tokyo 104
PHONE: 03-3543-5318
FAX: 03-3545-6071
TELEX: J2523969 KANEKY J

COMPANY: **KINSHO-MATAICHI CORPORATION**
ADDRESS: 2 Shuwa Shinkawa Bldg., 24-1, 1-chome Shinkawa,
Chuo-ku, Tokyo 104
PHONE: 03-3297-7270
FAX: 03-3297-7398
TELEX: J 22356

COMPANY: **OKURA & CO., LTD.**
Foods & Provisions Dept.
ADDRESS: 5F Okura-bekhan Bldg., 4-1, 3-chome Ginza,
Chuo-ku, Tokyo 104
PHONE: 03-3566-6580
FAX: 03-3562-2779
TELEX: J 22306

COMPANY: **MATSUOKA CO., LTD.**
ADDRESS: 10-12, 1-chome Higashiyamatomachi, Shinonoseki,
Yamaguch 750
PHONE: 0832-67-5566
FAX: 0832--67-5286
TELEX: 6823-66 MATSU J

COMPANY: **NEW NIPPO CORPORATION**
ADDRESS: 1-1, 2-chome Uchisaiwaicho, Chiyoda-ku, Tokyo 100
PHONE: 03-3506-5376
FAX: 03-3591-3575
TELEX: 03-3591-3575

COMPANY: **NIPPON SUISAN KAISHA, LTD.**
ADDRESS: 6-2, 2-chome Ohtemachi, Chiyoda-ku, Tokyo 100
PHONE: 03-3244-7210
FAX: 03-3244-7269
TELEX: NISSUI J32221

COMPANY: **NOMURA TRADING CO., LTD.**
Tokyo Marine Products Dept.
ADDRESS: Shin-yaesuguchi Bldg., 2-1, 2-chome Yaesu,
Chuo-ku, Tokyo 104
PHONE: 03-3277-4766
FAX: 03-3274-3803
TELEX: J 63367 NOMURA AJ 63367

COMPANY: **NOZAKI & CO., LTD.**
Mrine Products Dept.
ADDRESS: 16-19, 7-chome Ginza, Chuo-ku, Tokyo 104
PHONE: 03-3542-9221
FAX: 03-3545-2006
TELEX: J 22375

COMPANY: **SCHOONER TRADING CORPORATION**
ADDRESS: Tomizen Bldg., 11-4, 2-chome Ginza, Tokyo 104
PHONE: 03-3545-6301
FAX: 03-3545-8670
TELEX: 252-4124 SCHTRD J

COMPANY: **TAITO SEIKO CO., LTD.**
ADDRESS: Imaasa Bldg., 1-21, 1-chome Higadhi-shinbashi,
Minato-ku, Tokyo 105
PHONE: 03-3572-3235
FAX: 03-3571-7881
TELEX: J 25306

COMPANY: **TOHTO SUISAN CO., LTD.**
ADDRESS: 2-1, 5-chome Tsukiji, Chuo-ku, Tokyo 104
PHONE: 03-3541-5264
FAX: 03-3541-6239
TELEX:

COMPANY: **TAKEICHI & CO., LTD.**
ADDRESS: 2F Fujimoto Bldg., 12-6, 3-chome Nihonbashi
Kayaba-cho, Chuo-ku, Tokyo 103
PHONE: 03-3669-9252
FAX: J 23348 TAKESUN
TELEX:

COMPANY: **TOKYO COMMERCIAL CO., LTD.**
ADDRESS: Playguide Bldg., 6-4, 2-chome Ginza, Cguo-ku,
Tokyo 104
PHONE: 03-3562-2541
FAX: 03-3564-6743
TELEX: 0252-2432

COMPANY: **TOKYO SEAFOODS LTD.**
ADDRESS: 5F Saiesta Bldg., 14-5, 2-chome Tsukiji, Chuo-ku,
Tokyo 104
PHONE: 03-5565-3511
FAX: 03-5565-3524
TELEX: J 29880 TKYSEA